User Manual

Merging Contacts

Merging Contacts in MAX

- Over time duplicate names may have been created in your system. You can now Merge them together into one contact.
  - You can merge as many names together as you would like.
  - Once names have been merged you can NOT undo them. Please make sure you are merging the correct names before you hit the merge button.
  - This feature will merge all notes, polices, files, tags, and data associated with the names.

Search for the Contacts to Merge

MARKET ACCESS DIRECT

From the contact manager enter the search criteria you want to use to find your contacts (i.e., last name)
Click Search

Search Results

All contacts fitting your search criteria will be displayed.

Selecting Contacts to Merge

City Zip
County
Status : Actions Taken

☑ **James Hill**
12 Market Street
Mt Laurel, NJ 08054
(856)555-1234
10/1/1949

22 hours ago
21 hours ago
22 hours ago

Default :

2 weeks

New: Vacation in 2 weeks

`email` `football`

☑ **J Hill**
123 Market Street
Mount Laurel, NJ 08054
10/1/1949

22 hours ago
21 hours ago
22 hours ago

Client :

New: Needs additional coverage

`call` `life` `follow up`

☑ **Jim Hill**
123 Market Street
Mt Laurel, NJ 08054
(856)555-1234
10/1/1949

22 hours ago
21 hours ago
22 hours ago

Lead : Call

Call: Set appointment for Wednesday at 7:30 pm

`call` `football` `golf` `1q call` `asb happy birthday`

Search Contacts
Search "Mail Leads"
Search Submitted

Actions for Selected

Purchase Service
Broadcast Email
Email Lists / Drip Emails

Select the contacts that you want to merge by clicking the box next to the Contacts name.
Click Merge Contacts

Merge Contacts

Display of Names to Merge

Select the lead you wish to keep and the fields with values. Notes, Files etc. will be merged with the selected lead.

	James Hill (2310150)	J Hill (2310364)	Jim Hill (2310147)
Ownerid	Test Agent	Test Agent	Test Agent
Lead Type		New Business	
First Name	James	J	Jim
Last Name	Hill	Hill	Hill
Address	12 Market Street	123 Market Street	123 Market Street
City	Mt Laurel	Mount Laurel	Mt Laurel
State	NJ	NJ	NJ
Zip	08054	08054	08054
Phone	8565551234		8565551234
Cell	8565552345	8565550001	8565552345
Followup Date	7/7/2014 11:43 AM		
Priority	None	Warm	Hot
Role	Lead	Lead	Lead
Custom Status	Default	Client	Lead

The data from each Contact will be displayed alongside the other contact records.

The contact highlighted in grey is the name the system picks as the primary name that contains the most content or most activity.

Highlighted Data

Select the lead you wish to keep and the fields with values. Notes, Files etc. will be merged with the selected lead.

	○ James Hill (2310150)	○ J Hill (2310364)	● Jim Hill (2310147)
Ownerid	Test Agent	Test Agent	Test Agent
Lead Type		New Business ←	
First Name	James	J	Jim ←
Last Name	Hill	Hill	Hill
Address	12 Market Street	123 Market Street	123 Market Street
City	Mt Laurel	Mount Laurel	Mt Laurel ←
State	NJ	NJ	NJ
Zip	08054	08054	08054
Phone	8565551234		8565551234 ←
Cell	8565552345	8565550001	8565552345 ←
Followup Date	7/7/2014 11:43 AM ←		
Priority	None	Warm	Hot ←
Role	Lead	Lead	Lead
Custom Status	Default	Client	Lead ←

The information that is highlighted is the information that will be kept for that field and merged into the consolidated contact record.

The system will automatically pick up data from another contact if the field is empty in the primary contact.

Selecting Data to Keep

Select the lead you wish to keep and the fields with values. Notes, Files etc. will be merged with the selected lead.

	○ James Hill (2310150)	○ J Hill (2310364)	⦿ Jim Hill (2310147)
Ownerid	Test Agent	Test Agent	Test Agent
Lead Type		New Business	
First Name	James ←	J	Jim
Last Name	Hill	Hill	Hill
Address	12 Market Street	123 Market Street	123 Market Street
City	Mt Laurel	Mount Laurel ←	Mt Laurel
State	NJ	NJ	NJ
Zip	08054	08054	08054
Phone	8565551234		8565551234
Cell	8565552345	8565550001	8565552345
Followup Date	7/7/2014 11:43 AM		
Priority	None	Warm	Hot
Role	Lead	Lead	Lead
Custom Status	Default	Client	Lead

To select a different field, click on that field and it will become highlighted.

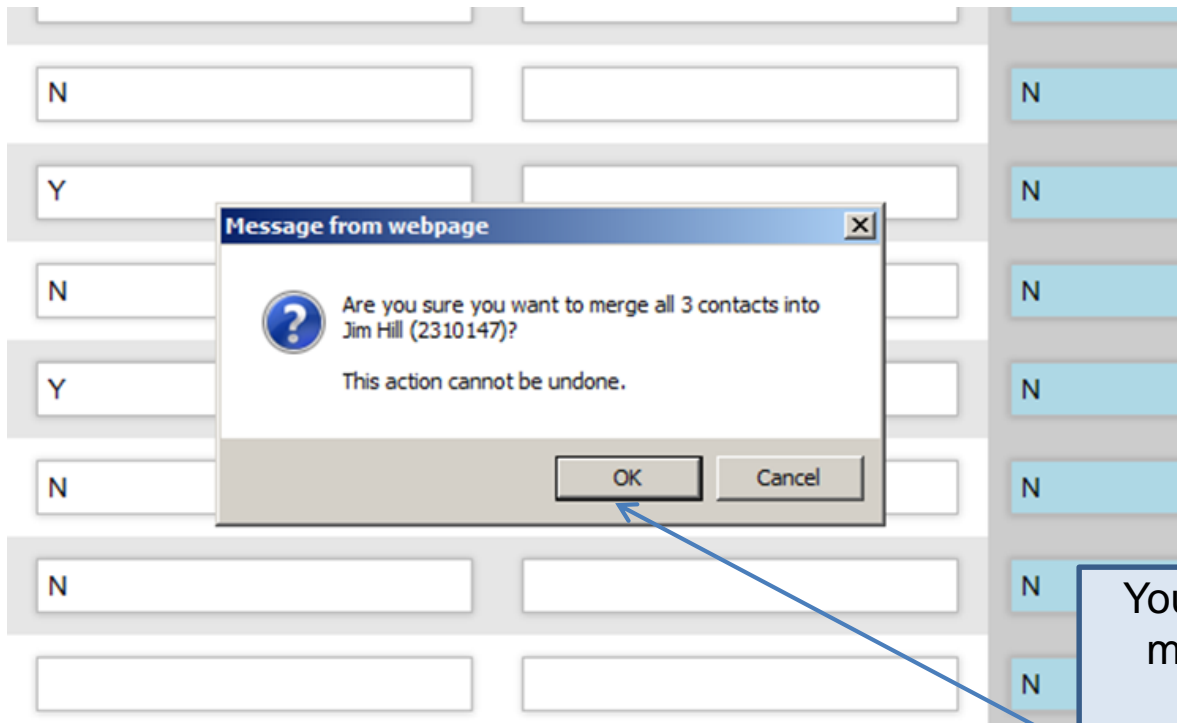**The highlighted fields are what will be kept after the merge.**

Merging Contacts

Click **Merge Contacts** when you have completed selecting the fields you want in the merged file.

Confirming the Merge

Message from webpage

? Are you sure you want to merge all 3 contacts into Jim Hill (2310147)?

This action cannot be undone.

OK   Cancel

You will receive the above message to confirm the merge.

Once you click ok
THE MERGE CANNOT BE UNDONE.

Merged Contact (Final)

After the merge is complete the system will return to the new (merged) contact record.
*Note the Additional comments at the top of the record have been combined.

Merged Contact (Final)

The tags from all 3 records have been combined as well.

Merged Contact (Final)

Policies

Policy #
951357

Premium
46.00

Notes
wants to get policy for spouse

Policy Type
Life Insurance Policy

Source
Existing

Edit

Carrier
Aarp

Date Added
6/16/2014 11:06 Am

Status
Issued

Effective Date
3/1/2012

Owner
J Hill

Policy #
58525456

Premium
112.00

Notes

Policy Type

Source
Existing

Edit

Carrier
Aflac

Date Added
6/16/2014 11:01 Am

Status
Issued

Submitted Date
5/16/2014

Owner
Jim Hill

Notes

☆ New   @ Email   T9 Message   ☎ Call   Demo   Contrac

Click Here to Add Notes...

Take Action

Save

Save & Go To Next

Cancel

Quick Email

Email Lists / Drip Emails

Manage Files

Transfer Log

Delete Contact

Policy Submission Form

Add New Policy

Need Help?

Submit Help Request

Policies have been moved to the new contact.

Merged Contact (Final)

Help

★ New   0 seconds ago

Merged Lead(s) on 06-17-2014
Merged by testagent2 (1078)
Data from Removed Leads:

Lead #2310150
id = 2310150
address = 12 Market Street
city = Mt Laurel
date_added = 2014-06-16 11:00:04
last_contact = 2014-06-16 11:20:37
last_modified = 2014-06-16 11:43:40
status = 1
status_list = `1`
tag_list = `30``619`
priority = None
custom_status = 0
admin_notes = Loves dogs
x_insurance_carrier = American Pioneer
x_spouse = Tina
x_premium = 200
last_action = New: Vacation in 2 weeks
x_plan_type = MS
x_plan_type_spouse = MS
x_insurance_carrier_spouse = American Pioneer
x_premium_spouse = 150
x_confined_to_bed = Y
x_confined_to_bed_spouse = Y
x_diabetes = Y
x_diabetes_spouse = Y
x_heart_trouble = Y
x_heart_trouble_spouse = Y
x_hospitalized = Y

Take Action

- Save
- Save & Go To Next
- Cancel
- Quick Email
- Email Lists / Drip Emails
- Manage Files
- Transfer Log
- Delete Contact
- Policy Submission Form
- Add New Policy

Need Help?

- Submit Help Request

In the bottom notes there is a section that displays the data from the merged contacts that was not kept.

This is the only place that information from the merged contacts will appear

Merged Contact (Final)

Take Action

- Save
- Cancel
- Quick Email
- Email Lists / Drip Emails
- Manage Files
- Transfer Log

☆ New   15 minutes ago   ✕ Delete

Merged Lead(s) on 06-17-2014
Merged by testagent2 (1078)
Data from Removed Leads:

Lead #2310150
id = 2310150
address = 12 Market Street
city = Mt Laurel
date_added = 2014-06-16 11:00:04
last_contact = 2014-06-16 11:20:37
last_modified = 2014-06-16 11:43:40
status = 1
status_list = `1`
tag_list = `30`619`
priority = None
custom_status = 0
admin_notes = Loves dogs
x_insurance_carrier = American Pioneer
x_spouse = Tina
x_premium = 200
last_action = New: Vacation in 2 weeks
x_plan_type = MS
x_plan_type_spouse = MS
x_insurance_carrier_spouse = American Pioneer
x_premium_spouse = 150
x_confined_to_bed = Y
x_confined_to_bed_spouse = Y
x_diabetes = Y
x_diabetes_spouse = Y
x_heart_trouble = Y
x_heart_trouble_spouse = Y

This data can be deleted by clicking on the X to the right of the notes.   If you choose to delete these notes they can not be retrieved again

Need Help?

- Submit Help Request

Merged Contact (Final)

Help

Lead #2310364
id = 2310364
first_name = J
cell = 8565550001
date_added = 2014-06-16 11:06:21
last_contact = 2014-06-16 11:06:21
followup_date = 0000-00-00 00:00:00
last_modified = 2014-06-16 11:44:04
status = 1
status_list = `1`
tag_list = `47`103`260`
priority = Warm
custom_status = 11
admin_notes = Best to call after 5 pm
last_action = New: Needs additional coverage

⭐ New   22 hours ago   ⊗
Vacation in 2 weeks

⭐ New   22 hours ago   ⊗
Needs additional coverage

📞 Call   23 hours ago   ⊗
Set appointment for Wednesday at 7:30 pm

Take Action

- Save
- Save & Go To Next
- Cancel
- Quick Email
- Email Lists / Drip Emails
- Manage Files
- Transfer Log
- Delete Contact
- Policy Submission Form
- Add New Policy

Need Help?

- Submit Help Request

The bottom notes from the other 2 records are now all listed in the merged contact.

Merged Contact (Final)

Now, when a search is done using the same last name criteria for the search, only one record is found and displayed.